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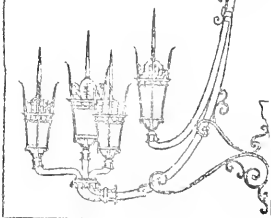


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THE FINANCE COMMISSION
OF
THE CITY OF BOSTON
Three Park Street
Boston, Mass. 02108

COMMISSIONERS:

Andrea W. Wasserman, Chairman
Frederick R. H. Witherby, Esq.
William A. Davis, Jr., Esq.
Henry B. Wynn, Esq.
Percy C. Wilson

BOSTON REDEVELOPMENT AUTHORITY
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December 16, 1975

At its meeting on August 27, 1975, the Finance Commission, acting upon information it had received, voted to conduct an investigation into the management and finances of the Boston Housing Authority (hereinafter "BHA"). The Commission's investigation is continuing. This first report upon the Commission's findings is limited to the BHA's state modernization program.

Massachusetts created housing authorities in 1935. Then, as now, their purpose was to provide adequate housing for residents of the City who could not otherwise afford to obtain it. The BHA was organized by vote of the City Council with the approval of the Mayor on October 1, 1935. The BHA is governed by a five member board, four of whom are appointed by the Mayor and confirmed by the City Council. The fifth member is appointed by the State Department of Community Affairs. The BHA board has appointed Samuel Thompson to be the Authority's Administrator, and Dr. Thompson exercises day-to-day supervision over the management of the Authority.

The BHA is by far the largest single source of housing for low income and elderly persons in the City. The Authority's most recent annual Report estimates that the Authority is providing housing in its developments and its leased housing for more than 60,000 persons, or more than 10% of the City's population. Of this total, the BHA provided 3,681 units of low income housing in ten state aided developments, and 10,348 units in nineteen federally aided developments.

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The BHA low income developments offer housing of last resort to residents of the City who otherwise could not obtain housing. But the BHA developments were all built in the 1940's and early 1950's. They are aging, and even aside from the perennial need for improved maintenance they need major capital improvements.

The social and living conditions in many of the BHA developments have been the subject of long standing complaints. The findings of the Court in the class action suit against the BHA (Perez et als v. Boston Housing Authority) now pending in the Boston Housing Court confirm these complaints in graphic detail. Many of the BHA's housing units are literally uninhabitable. The Court concluded that the conditions it found "demonstrate BHA's utter failure to comply with its [statutory] mandate to provide 'decent, safe and sanitary dwellings within the financial reach of families or elderly persons of low income....'"

However, the recent ruling of the Supreme Judicial Court in the Perez case has made it clear that the Housing Court cannot require the expenditure of state funds to rectify the conditions existing in the BHA developments. Instead, the Court notes that the Housing Court's proceedings may offer guidance and precedence for "discretionary action by the legislative and executive branches." It is the hope of the Finance Commission that its investigation into the management and finances of the BHA will assist in making possible lasting reforms.

Objections by BHA to Finance Commission Investigation

In the course of its investigation into the state modernization program the Finance Commission subpoenaed the BHA auditor responsible for maintaining state modernization records. The auditor appeared before the Commission on October 2, 1975, accompanied by the General ^{counsel} Court of the BHA,

Kevin Feeley. Upon the advice of Mr. Feeley the witness had refused to bring with him records required by the subpoena. Moreover, also upon the advice of Mr. Feeley, who was acting on behalf of the Administrator of the BHA, the witness refused to be sworn. Mr. Feeley's advice was based upon his claim that the Finance Commission lacks statutory authority to investigate the BHA.

The Finance Commission believes that the BHA's claim of lack of jurisdiction is entirely without merit. The Finance Commission is empowered by section 18 of the City Charter "to investigate any and all matters relating to appropriations, loans, expenditures, accounts, and methods of administration affecting the City of Boston...that may appear to the commission to require investigation." Although the BHA is a public body distinct from the City, it has close legal and functional ties to the City. The Courts have recognized "the close relationship between an authority and the town." (Collins v. Selectmen of Brookline 325 Mass. 562, 567), and in a case where this Commission's jurisdiction was unsuccessfully attacked the Court noted areas "in which a housing authority's operations are inevitably interwoven with the management and interests of the city in which it operates." Finance Commission of Boston v. McGrath, 343 Mass. 754, 763-764. The Court further stated that "In substantial respects, such an authority may vitally affect the interests of the community or communities in which its functions are executed." Since the time of the McGrath decision the affairs of the BHA have become even more markedly interconnected with those of the City. In fact, the City plans to use approximately \$3.5 million of its Community Development Block Grant funds upon modernization and payroll expenses of the BHA. See Attachments I and II.

Shortly before the issuance of this Report the BHA offered to permit the Finance Commission to proceed with its investigation, without contesting or conceding the Commission's jurisdiction, but the BHA insisted upon providing its counsel to BHA employees who were witnesses at Commission hearings. The Finance Commission cannot agree to this condition. This very issue was recently litigated and was resolved in favor of the Finance Commission. In that case the Court held that:

"In the exercise of its power to adopt reasonable rules and regulations for the conduct of its hearings and the giving of testimony before it, the Finance Commission may adopt a rule or regulation which places a limitation or restriction upon the right of witnesses appearing before it at a closed investigative hearing to be represented by attorneys of their own choice, in that the Fin Com may decline to permit representation of witness - by attorneys who also represent the person who, or the firm or corporation which, is the subject of, or closely involved in, such investigation."

In light of the above decision the Finance Commission does not understand how the BHA can maintain its present position.

The refusal of the BHA to cooperate with the Finance Commission has succeeded in hindering and limiting the Commission's investigation. Because of this lack of cooperation the Finance Commission has limited this Report to its examination of the state modernization program, for which state records exist.

STATE MODERNIZATION PROGRAM

The Legislature recognized the need for capital improvements to state aided housing developments, and in 1969 authorized local housing authorities to "undertake as a separate project the renovation, remodeling, reconstruction, repair, landscaping and improvements" of existing state-assisted projects. See G.L. c. 121B, s. 26(j). In four separate appropriations since 1969 the Legislature has provided almost six million dollars for the modernization

of the BHA's ten state aided developments. The Department of Community Affairs, under the supervision of the Office of Communities and Development, is the state agency authorized to contract with the BHA for the purpose of undertaking modernization projects. This it has done in a series of four separate phases. By agreement between the Department and the BHA these funds were allotted on a per unit basis rather than upon the basis of relative degrees of need. In view of the limited funds available for modernization and the need for physical rehabilitation the Department of Community Affairs intended to give funding priority to proposals limited strictly for the purpose of physical modernization. All proposals were also intended to include the full involvement of tenants in decisions affecting them. In addition, all funding after January 1, 1972, was to be contingent upon substantial accomplishments in the area of non-physical modernization, meaning a thorough updating of all management policies and practices, undertaken in cooperation with representatives of all tenants of each affected housing project.

When the Finance Commission learned of problems in the state modernization program it contacted the Secretary of Communities and Development, William Flynn, to discuss them with him. Mr. Flynn cooperated fully with the Finance Commission. However, it was evident to Mr. Flynn as well as to the Finance Commission that the Department of Community Affairs had not monitored the State modernization program effectively, had not insisted that the BHA comply with the Department's rules and regulations governing the modernization act of 1970, had not answered complaints and had maintained inadequate records of modernization expenditures. As a result of the Commission's investigation and Mr. Flynn's concern, he assigned an employee to monitor the operations of the BHA and opened his records to the Finance Commission.

The Finance Commission then proceeded to make a thorough review of each modernization expenditure and, wherever possible, attempted to verify expenditures with performance.

During the Commission's review of modernization records it continuously noted charges for "forced account labor," meaning labor charges for persons who were not BHA employees. These charges were to pay labor costs incurred on modernization projects. To date, the "forced labor" charges are in excess of \$200,000.

The Finance Commission has informally questioned a number of BHA maintenance employees who have stated that they had worked on modernization projects. Additionally, the 1974-75 BHA Annual Report mentions "major projects undertaken and completed during the year by the Maintenance Department." Included in these projects were several security measures which were actually funded through modernization. The "forced account" labor was intended to be skilled or unskilled workers hired specifically to perform modernization functions. The Department of Community Affairs approved payment for "forced account" labor upon the understanding that these persons were not to be BHA employees.

It would appear that a large portion of these labor charges should not have been authorized. BHA employees are provided for in the regular personnel payroll. By authorizing payment of "forced account" labor costs, the Department of Community Affairs has, in effect, paid the cost of this maintenance twice. The Commission cannot be sure of the magnitude of the problem, but unquestionably a large portion of this aspect of modernization funding is improper. Secretary of Communities and Development, William Flynn, has assured the Finance Commission that his agency will pursue this matter and require documentation to support all past as well as future "forced account" labor costs.

The Finance Commission has discovered numerous additional irregularities involving modernization. Following is a review of some of the problems.

West Broadway, state aided development 200-1, is a 972 unit development located on D Street, South Boston. West Broadway has been authorized \$1,568,813 in the first four phases of state modernization. Despite the fact that West Broadway is a poorly maintained development and urgently needs physical improvements there remains to date \$462,503 in unexpended modernization funds. Moreover, the Finance Commission has found the following discrepancies in the performance of past modernization expenditures.

(1) By December, 1974 the Department of Community Affairs had authorized the release of \$30,506 to purchase 200 exterior security lights and \$19,912 for the electricians and laborers to install those lights. The Finance Commission and a representative from the Department of Community Affairs went to D Street to verify completion of the work. This inspection revealed that only 89 security lights were actually installed.

(2) Nine hundred forty seven kitchens were allegedly modernized at a cost of \$695,420. D Street has a number of small apartments that have been broken through to enable them to provide several four and five bedroom apartments. The BHA also set aside a section of one building as a multi-service facility for tenants. The result of these changes is that there are only 942 units available for occupancy. Additionally, there are a large number of vacant and heavily vandalized apartments, currently in excess of 100. The Finance Commission talked with several BHA management and maintenance employees at D Street as well as with many tenants. As best the Commission is able to determine there were between 860-870 apartments occupied at the time the kitchens were modernized. Unoccupied apartments were not modernized. The BHA employees at D Street stated that they had retained the materials on kitchens which were not modernized. This claim cannot be

verified, because when the Commission asked to see the remaining materials it was told that much of it had been stolen and that little remains. In any event, the Finance Commission concluded that the contractor did not modernize 947 units. If he did indeed merely leave the materials, a credit should have been made against the contract deducting labor costs. No such credit exists. Additionally, of the two change orders on the contract, one, for range hoods at a unit cost of over \$37, is clearly excessive, considering the fact that the items supplied consisted of no more than small metal guards.

(3) A kitchen painting contract was also let for 947 kitchens at a cost of \$44,444.44. As the Finance Commission noted above no more than 860-870 apartments were occupied at the time and only occupied apartments were painted.

(4) In light of observations 2 and 3 above the Finance Commission questions whether the architectural contract in the amount of \$68,000 or the charge for a clerk of the works in the amount of \$6,336 should have been paid. Both the architect and the clerk of the works should have been aware of the number of kitchens modernized before signing off on the contract.

Camden Street, state-aided development 200-2 is a small (72 unit) development in the South End. During modernization Phases I, II and III it was awarded \$105,408 of which \$38,493 remains unexpended. The Department of Community Affairs modernization records and the Finance Commission investigation indicate the following.

(1) An authorized expense of \$5,041.20 for exterior security lights and their installation. On its inspection of Camden Street, however, the Finance Commission found no new exterior lighting. The exterior lights at Camden have been there for 30 years.

(2) Labor costs for the installation of locks on basement windows amounted to \$8,792. The Finance Commission questions the propriety of these labor charges against modernization funds, because the Commission has learned that much of the work was performed by existing BHA personnel.

Commonwealth, state aided development 200-3, is a 648 unit development in Brighton. Modernization Phases I, II, and III provided \$779,025 in modernization funds to Commonwealth, of which almost \$300,000 remains unspent. Over \$60,000 has been spent on forced labor during the course of modernization. Here again the Commission's enquiries show that regular BHA employees performed at least a portion of the modernization work. That being the case the labor charges in the amount rendered are certainly improper.

Faneuil, state aided development 200-4, is a 358 unit development in Brighton. It has received \$333,206 in state modernization funds and has yet to expend over \$90,000 of that total. Faneuil is one of the better BHA developments. In comparing the conditions and maintenance to that of D Street, it is hard to believe they are both operated by the same authority. Faneuil however, does not escape its share of modernization irregularities.

(1) A charge of \$7,626.50 was authorized for the purchase of exterior security lights. An additional charge of \$4,978 was expended for their installation. There are no exterior security lights at Faneuil. The Finance Commission spoke with both the manager and the tenant president and both indicated that the lights were in storage at a BHA storage facility at the rear of 125 Amory Street, Jamaica Plain. The Finance Commission confirmed that the lights are there. However, the labor charge for lights which have not been installed is clearly improper.

(2) In addition to the above there are two labor charges amounting to \$13,110. The Finance Commission again questions the appropriations for labor.

Fairmount, state aided development 200-5, is a 202 unit development in Hyde Park. It received \$312,577 in modernization phases I-IV and has \$23,587 remaining. In excess of \$16,000 was charged for forced labor.

Archdale, state aided development 200-7, is a 288 unit development in Roslindale. Its modernization phases I, II, and III allotments totaled \$380,072 of which some \$209,123 remains to be spent. The Finance Commission investigation into Archdale revealed the following.

(1) An expenditure of \$13,677.34 was granted for the purchase and installation of 60 exterior security lights; however, upon inspection the Commission found that only 30 lights exist.

(2) "Forced labor" charges in excess of \$10,000.

(3) Proposals for, but no action upon new bathrooms and needed masonry repairs despite the existence of over \$200,000 in unexpended modernization funds.

Orient Heights, state aided development 200-8, is a 354 unit development in East Boston. It has been authorized \$452,836 in state modernization funds and has yet to expend over \$74,000 of that total. An expenditure of \$7,542.48 was authorized for the installation of door peepholes. However, there are no peepholes at the Orient Heights development.

Gallivan Boulevard, state aided development 200-10, is a 251 unit development in Mattapan. It is comprised of a number of single family houses and two and three-family units. It has been allowed \$329,788 in the first four phases of modernization and has just over \$20,000 remaining. Its modernization contracts have been satisfactorily completed.

Franklin Field, state aided development 200-11, is a 504 unit development in Dorchester. It was allotted \$710,709 in modernization phases I, II, and III. Here again, despite the obvious need for physical improvements, \$314,228 remains unexpended. There are also the following problems with modernization costs.

(1) \$20,610.15 was expended for the purchase and installation of 85 exterior security lights. The Finance Commission found that only 64 lights were actually installed.

(2) Including the labor charges mentioned above, in excess of \$24,500 was expended from modernization funds for labor costs. The Finance Commission has talked with a number of laborers and maintenance people and has been told they performed modernization labor. If that is true then it is certainly improper for the BHA to charge these labor costs to modernization. We repeat, these labor costs are already provided for in the regular payroll.

South Street, state aided development 200-12, is a 132 unit development in Jamaica Plain. Modernization phases I, II, and III provided \$171,758 in modernization funds; \$144,556 of that has been expended. The Finance Commission found that although \$10,655.52 was spent for the purchase and installation of 36 exterior security lights only 15 are installed. Here again the Commission questions the forced labor costs. Additionally, the Commission has observed that many tenants are in need of new refrigerators, since some are in such a state of disrepair that they are unusable.

In addition to the modernization problems mentioned above, the Finance Commission found a standard invoice in an amount of \$20,700 for a consultant contract with one Robert DeVirgilio, payable from the modernization account. (Attachment III) Mr. DeVirgilio, now a Department of Community Affairs employee has told the Finance Commission that he received less than \$10,000 under that contract.

The Finance Commission has found serious problems regarding state modernization. The BHA has submitted false invoices claiming expenditures which in some instances simply never occurred. See, for example, starred item on Attachment IV. The BHA apparently improperly charged labor costs to modernization. They have ignored the rules and regulations established by

the Department of Community Affairs to operate the modernization program.

Additionally the BHA has disregarded its own modernization procedures set forth in a communication of August 26, 1974 (See Attachment V). The directives established in that communication list specific duties for project managers, director of management, director of maintenance, contracting officer, purchasing agent, legal department, director of finance and accounts, tenant task forces and the tenant policy council. The Finance Commission has determined that many of the duties outlined in the BHA's own modernization procedures are not followed.

If modernization procedures had been followed many of the irregularities outlined in this report would not have occurred.

The Finance Commission has been in contact with tenant representatives of each project as well as the City-wide Tenants Policy Council. They are certainly concerned with the problems and have cooperated fully with the Commission in its efforts to determine the extent of the modernization irregularities.

The Finance Commission also met with Secretary William Flynn of the Office of Communities and Development and has worked with his staff in the Commission's investigation. In a recent meeting Mr. Flynn has assured the Commission that his office will monitor the modernization program closely, will require site inspections prior to allowing payments in modernization programs and will review past discrepancies outlined by the Finance Commission. Furthermore, Mr. Flynn has assigned a person to oversee the BHA on a regular basis. His office is also in the process of establishing a policy of allotting phase V modernization funds on a need basis, replacing the previous policy of allocating funds on a per unit basis. The Commission is encouraged that its investigation has resulted in positive action by the Department of Community Affairs.

Unfortunately, the BHA has chosen not to cooperate with the Finance Commission in its investigation of problems and irregularities in the modernization program. But unless the difficulties in the past administration of the modernization program are analyzed and understood it seems doubtful that the BHA will be able to spend the remaining portion of the modernization funds, or future funds, with improved effectiveness.

The problems outlined in this Report regarding misspent modernization funds and missing equipment speak for themselves. However, the Finance Commission is equally concerned with the failure of the BHA to spend \$2,376,000 of available funds, particularly in view of the enormous need for physical improvements in the Authority's developments.

The Commission has provided the Administrator of the Boston Housing Authority, Dr. Samuel Thompson, with a copy of this report and it urges him to discuss it with the Commission.

In summation the Finance Commission has uncovered serious irregularities in the modernization program. There are additional areas of concern involving the Authority. The Commission intends to pursue an investigation of Housing Authority practices in other areas, and, if necessary, to seek judicial enforcement of its subpoenas of Housing Authority employees.

Respectfully submitted,

Andrea W. Wasserman Gargiulo, Chairwoman

Frederick R. H. Witherby, Esq.

William A. Davis, Jr., Esq.

Henry B. Wynn, Esq.

Percy C. Wilson,

THE FINANCE COMMISSION

Peter Hiam,
Confidential Secretary



THE FINANCE COMMISSION
OF
THE CITY OF BOSTON
Three Park Street
Boston, Mass. 02108

COMMISSIONERS:

Andree W. Wasserman, Chairman
Frederick R. H. Witherby, Esq.
William A. Davis, Jr., Esq.
Henry B. Wynn, Esq.
Percy C. Wilson

November 17, 1975

To the Honorable Kevin H. White
Mayor of Boston
One City Hall Square
Boston, Massachusetts 02201

To the Honorable the Mayor:

By letter dated October 28, 1975, David Strohm, Director of your office of Community Development has requested your permission to award a contract to the Boston Housing Authority without public advertisement in an amount not to exceed \$3,045,000 for the period June 6, 1975 to December 31, 1976. The funding source is to be the City's Community Development Block Grant funds.

This program has aroused our interest and concern because of an investigation this Commission has been conducting into the Boston Housing Authority. We have reviewed the Authority's state modernization expenditures, and in connection therewith we have visited every Authority housing development which receives state aid. We intend to issue a full report upon our findings in the near future. However, for purposes of this comment upon the proposed expenditure of the City's Block Grant funds we would like to bring to your attention the fact that we have found serious deficiencies and irregularities in the Authority's past modernization programs. These problems, which have limited the effectiveness of the modernization program, include the following:

(1) Instances in which the Authority either has not received the services or equipment paid for from modernization funds or has not required performance in accordance with contract specifications;

(2) Failure by the Authority to implement needed modernization despite availability of funds;

(3) Perpetuation of existing inequalities between the Authority's housing developments by allocating modernization funds on a per unit basis rather than according to need;

(4) Failure of the Authority to follow its own modernization procedures.

To the Honorable Kevin H. White

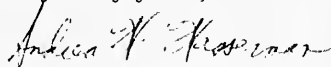
Page 2

November 17, 1975

We note that your office of Community Development has made an initial decision to limit the use of these Community Development Block Grant funds to federally funded Boston Housing Authority developments. This decision is not required by federal law or by the terms of the Grant. This appears to us to be an arbitrary decision, similar to the policy of the state modernization program of allocating funds on a per unit basis. We can see no justification for spending these funds according to any priority other than that of relative need.

Our investigation of the Boston Housing Authority has been hampered by its claim that we have no jurisdiction and its refusal to cooperate with this Commission. Our detailed examination of the Authority's modernization program, however, has revealed a major failure in provision of services to the tenants of the City's public housing. We support the use of Community Development Block Grant funds upon capital improvements in the Authority's housing developments. However, because the nature of the expenditure of Block Grant funds is essentially similar to both the federal and state modernization programs we strongly urge you to implement the administrative procedures necessary to prevent a repetition of the Authority's past failures in this area.

Very truly yours,



Andrea W. Wasserman
Chairman

AWW/Bi

cc: David Strohm
Herbert Gleason



ATTACHMENT II

E FINANCE COMMISSION
OF
THE CITY OF BOSTON
Three Park Street
Boston, Mass. 02108

COMMISSIONERS:

Andree W. Wasserman, Chairman
Frederick R. H. Witherby, Esq.
William A. Davis, Jr., Esq.
Henry B. Wynn, Esq.
Percy C. Wilson

November 17, 1975

Honorable Kevin H. White
Mayor of Boston
One City Hall Square
Boston, Massachusetts 02201

To the Honorable the Mayor:

By letter dated October 6, 1975, David Strohm, Director of your office of Community Development, requested your permission to award a contract without public advertisement to the Boston Housing Authority in an amount not to exceed \$440,000 for the period September 1, 1975 to December 31, 1975. The funding source is the City's Community Development Block Grant Funds. The announced purpose of this use of the City's Block Grant Funds is for the modernization of public housing by providing the painters and the necessary supplies to paint Boston Housing Authority units.

At its meeting on August 27, 1975, the Finance Commission authorized an investigation into the Boston Housing Authority. In the course of our enquiries conducted since that time we have reviewed records and made site inspections of every state housing development in the City. We have particularly noted the discrepancy between indicated expenses and performance in the state modernization program.

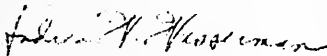
Since Mr. Strohm's letter states that the purpose of the expenditure is modernization we met with him and discussed the project in detail. We told Mr. Strohm that it was our understanding that the funds are to be spent to pay the salaries of painters who are presently Authority employees and are included in the budget submitted by the Authority to the Department of Community Affairs and the Department of Housing and Urban Development for the Authority's fiscal year ending March 31, 1976.

These are the same painters who were laid off last August and were reinstated with back pay one week later. There have been complaints about the productivity of the Authority's painters, and we understand that the Authority is considering the replacement of its painters by outside contract painters. It is our opinion, which we conveyed to Mr. Strohm, that the Authority's painters are engaged in regular maintenance and that such maintenance is payable from the Authority's operating income. The proposed expenditures would therefore constitute no more than a short term subsidy of the Authority's operating expenses without any

permanent effect. We question whether this expenditure will result in even a significant temporary benefit to the Authority's public housing, since we understand that many of the painters are using this opportunity to use up accrued sick leave time. We oppose spending the City's Block Grant Funds for such a purpose.

In our investigation of conditions at the Authority's projects we have found a tremendous need for physical plant upgrading and for improvement in maintenance and management. We certainly approve of the spending of Community Development Block Grant Funds to improve the City's public housing. However, as we told Mr. Strohm, we strongly urge that the City monitor the spending of any Block Grant Funds awarded to the Authority, including the conduct of field audits. We further urge that the City spend Block Grant Funds upon public housing in a manner which assures improvements rather than a continuation of present conditions.

Very truly yours,



Andrea W. Wasserman
Chairman

AWW/BN

cc: David Strohm
Herbert P. Gleason

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STANDARD INVOICE



PURCHASE ORDER NO

VENDOR'S CODE

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046-001-907-000-1

STATE AGENCY

DATE	LOCATION TO WHICH DELIVERED	REMARKS
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Department of Community Affairs

100 Cambridge St., Boston, Mass.

NAME
AND
ADDRESS
OF
VENDOR

Boston Housing Authority
53 State Street
Boston, Massachusetts

VENDOR'S CERTIFICATION:

I certify that the goods were
shipped or the services rendered
as set forth below.

(Please Sign in ink)

1975-

INSTRUCTIONS TO VENDOR:

1. Do not fill in shaded areas.
2. This form supersedes all previous Standard Invoices.
3. Use a separate Invoice for each separate Purchase Order or Delivery on contract.
4. Direct all inquiries to the state agency.

DO NOT REMOVE CARBONS

Check if final delivery:

TOTAL \$ 35,343.80

CASH DISCOUNT \$

NET AMOUNT \$

TOTAL LIQUIDATION \$35,243.00

CARRIED OVER	PER THE
EXPLANATION	EXPLANATION
LOAN ACT OF	70, CH. 11
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AGENCY:

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Price
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STATE OF NEW YORK
DEPARTMENT OF TAXATION AND FINANCE

ALL TAXPayers ARE TO

INTER-OFFICE COMMUNICATION

August 26, 1974

TO: ALL HOUSING MANAGERS & GENERAL HOUSING MANAGERS

FROM: JAMES J. O'ROURKE, DIRECTOR OF MANAGEMENT

AT: CENTRAL OFFICE

SUBJ: MODERNIZATION PROCEDURE

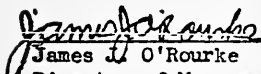
Attached are copies of the Modernization Procedure which was discussed with you at a recent joint meeting of Housing Managers and Development Task Force personnel.

This procedure is effective when you receive it and therefore your staff must become familiar with it.

Any Modernization Program is a mutual effort between the local Housing Manager and the Development Task Force members. Therefore, the key to its success is communication between the parties.

Although this procedure pertains to State-Aided Developments at this time, nonetheless it is to be applicable to Federal-Aided Developments.

All other Boston Housing Authority staff sections are committed to assist you when necessary.


James J. O'Rourke
Director of Management

JJOR/st

cc: Staff Distribution
Leo J. Donovan, Asst. Adm. - Operations
Tenant Policy Council
Task Forces

Attachment

AUG 29 1974

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FINANCE AND ACCOUNTS WILL:

1. Verify that funds are available for Modernization items.
2. Request from DCA or HUD funds required to implement or perform Modernization work.
3. Process payment to vendors, contractors, and consultants after approval by the Authority.
4. Prepare for the Task Force and the Managers quarterly Modernization Reports.

TASK FORCE WILL:

1. Inform other residents in their community of the Modernization Program.
2. Report to the Manager areas of concern from the community.
3. Sign Purchase Requisitions to have work implemented.
4. Sign approvals before contracts are awarded.
5. Submit names to the Manager of qualified persons who can become tenant coordinators.
6. Attend monthly meetings with the Manager and assist him in the process of the program.
7. Attend bid openings and pre-construction conferences.
8. Assist in preparation of budgets in conjunction with Manager.

TENANT POLICY COUNCIL WILL:

For detailed instructions refer to TPC By-Laws.

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MODERNIZATION PROCEDURE

All Housing Managers will coordinate all phases of the Modernization Program in their developments. They will coordinate the program with the Development Task Force and the various members of the Authority staff and share joint responsibility. It will be the Manager's responsibility to know the stage of each item and the progress towards its completion. Managers will maintain a Progress Chart for each item. Overall coordination of the Modernization Program will continue as the responsibility of the Maintenance Department with Mr. John Jennette, Assistant Director, in direct charge. Specific duties are listed as a guide to all individuals and sections:

MANAGER WILL:

1. Establish Task Force meetings to be scheduled mutually between Task Force and Manager, not less than once a month and to be held at reasonable hours.
2. Review with the Task Force all priorities and budgetary requests to include total program at each development.
3. Secure any sign off requests for Modernization from the Task Force using BHA Form M-1; countersign requests to purchase; copies to Manager and Task Force.
4. Request from the Director of Maintenance implementation of Modernization work items. Review scope of contract.
5. Requisition Personnel Department for employment of tenant coordinators, where necessary. Specify a particular job and specific length of time. Coordinator to submit to Manager and Task Force Progress Reports. Supervise coordinators hired under the Modernization Program for his/her conduct and time. When approved, add to development payroll charged to Modernization.
6. Attend meeting requested by the Director of Management.

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10. The following information is being furnished to you for your information only. It is not intended to be used for any other purpose.

1. The first step is to identify the problem or question that needs to be answered. This involves understanding the context and the specific requirements of the task.

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DIRECTOR OF MANAGEMENT WILL:

1. Along with the Director of Maintenance establish City-Wide priorities for the implementation of Modernization Work.
2. Receive Monthly Reports from General Housing Managers on Modernization Progress.
3. Be responsible for Management attendance at Task Force meetings, bid openings and construction conferences.
4. Attend Central Tenant Policy Council Modernization Committee meetings.

DIRECTOR OF MAINTENANCE WILL:

1. Determine whether items of work will be done by Force Account or on contract.
2. Along with the Director of Management establish City-Wide priorities for the implementation of Modernization Work.
3. Supervise all Force Account labor for the technical crafts.
4. Notify Managers and Director of Finance & Accounts when Modernization Force Account labor is moved temporarily to perform emergency work and indicate expected date of return.
5. Supervise preparation of Plans and Specifications for contract work whether to be accomplished by engineering staff or consultants.
6. Assist the Manager and the Task Force in preparing budgets.
7. Submit to the Managers and Task Force a sample of products to be used in the Modernization Program.
8. Provide plans and specifications to Managers and Task Forces.

... and the Tank Force is prepared
... be accomplished by engineering...
... and Specialized...
... work and indicate expected...
... Force Account Labor is...
... Director of Finance &...
... Labor for the...
... of Management...
... will be done...
... will be...

CONTRACTING OFFICER WILL:

1. Notify Director of Management to invite Managers and Task Force Chairmen to bid openings.
2. Notify Director of Management to invite Managers and Task Force Chairmen to pre-construction conferences.
3. Notify, DCA, HUD and the Director of Management of date of final inspection of Modernization contracts.
4. Supervise and coordinate Modernization contracts.

PURCHASING AGENT WILL:

1. Prepare Purchase Orders.
2. Closely follow-up to assure that vendors make deliveries promptly or within specified time.
3. Send any new or improved product information that might be helpful in Modernization work to the Director of Maintenance and Housing Manager.

LEGAL DEPARTMENT WILL:

1. Review all specifications for their legality.
2. Prepare advertisements. Inform Director of Management, who will notify Manager.
3. Prepare all contracts after award by the Authority.
4. Submit contracts to DCA or HUD for their approval.

